

## **Guidelines for Procurement and Expenditure/Match Documentation**

It is important to remember that all expenditures must be: *allowable*, *allocable* and *reasonable* to ensure the purchase is perceived as a good use of taxpayer dollars and in compliance with state and federal guidelines.

Listed below are the Procurement Guidelines and Rules for Expenditure and Match Documentation.

<b>GEAR UP Procurement Guidelines</b>	
<b>Topic</b>	<b>Points to Consider</b>
Pre-approval	<ul style="list-style-type: none"><li>▪ Procurement purchases must be pre-approved.<ul style="list-style-type: none"><li>○ “Goods” (example: technology, furniture, equipment).</li><li>○ “Services” (example: consultants, contracts).</li><li>○ Gift Cards <i>are not allowable</i> per Iowa Code.</li><li>○ Food purchases are discouraged as it is difficult to justify such purchases as <i>reasonable</i></li></ul></li><li>▪ Send pre-approval request(s) and supporting documentation to the GEAR UP Project Coordinator via email</li></ul>
State Procurement Rules	<ul style="list-style-type: none"><li>▪ <b>Goods/Services under \$1,500:</b><ul style="list-style-type: none"><li>○ Competitive bids are not required when procuring goods up to \$1,500</li><li>○ Schools are still required to follow district purchasing policies<ul style="list-style-type: none"><li>▪ If the district policy requires bids on items under \$1,500, school must comply with that policy. Those bids do not need to be sent to GEAR UP Iowa for approval per State guidelines.</li></ul></li></ul></li><li>▪ <b>Goods/Services over \$1,500 and under \$10,000:</b><ul style="list-style-type: none"><li>○ Schools will need to seek informal 3 bids or quotes from vendors.<ul style="list-style-type: none"><li>▪ School may contact vendors directly and request a quote or</li><li>▪ School may be able to find pricing information for goods online.</li></ul></li><li>○ Bids need to compare like items to ensure accuracy</li></ul></li><li>▪ <b>Goods/Services over \$10,000 and under \$50,000:</b><ul style="list-style-type: none"><li>○ Follow the same informal bid process as listed above</li><li>○ GEAR UP Iowa may require the school to select the lowest bid depending on the item(s).</li></ul></li><li>▪ <b>Goods/Services over \$50,000:</b><ul style="list-style-type: none"><li>○ Items over this amount will need to adhere to a formal bid process.</li><li>○ Schools must seek 3 bids</li><li>○ GEAR UP Iowa Accounting will select the vendor to award.</li></ul></li></ul>
Exceptions	<ul style="list-style-type: none"><li>▪ Common exceptions to the Procurement Policy include:<ul style="list-style-type: none"><li>○ The School/District holds an existing contract with the vendor</li><li>○ There is only one option for a vendor.</li><li>○ Other situations may apply.</li></ul></li><li>▪ Attach explanation of the exception to the quote.</li><li>▪ Contact GEAR UP Project Coordinator to ask if the situation warrants an exception.</li></ul>

For information on the State of Iowa Procurement rules, see Chapter 117 of the Iowa Administrative Code:

<https://www.legis.iowa.gov/law/administrativeRules/rules?agency=11&chapter=117&pubDate=09-25-2013>

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**\*\* Schools must adhere to district purchasing policies in any instance where the district policy is stricter than GEAR UP Iowa purchasing requirements. \*\***

**\*\* Under NO circumstances may Federal Funds be used to pay for entertainment to include amusement, diversion or social activities. \*\***

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